

# DocuShare 2.2 Quick Reference

This guide provides an overview of DocuShare's most commonly used features. It is intended for users who want quick answers and feel they have a good understanding of Web-based technology. Consult the User's Guide for a more complete and detailed description of DocuShare functions.

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## ***Getting Started***

### Platform Requirements

You can access and use DocuShare from a standard Web browser on any computer platform and operating system for which World Wide Web access is available, including Microsoft Windows 95, 98 and NT; Macintosh; and Sun, Solaris and SGI (UNIX). You can also access and use DocuShare from within the Microsoft Windows Explorer on Windows 95, 98 and NT.

### Browser Requirements

Internet Explorer 3.0 and Netscape Navigator 2.0, and their subsequent releases are known to work well with DocuShare. Other browsers will need to support "client-side cookies" for login, and third-party "viewers" for display of diverse content formats.

DocuShare supplies an optional file-upload helper application for installation on your computer if your browser does not support file-upload. (For example, Internet Explorer 2.0 and 3.0 do not support file-upload.) This is available for Windows 95/98/NT, NT 3.51 and Windows 3.x. Installation instructions are available in the User's Guide.

To make the most effective use of DocuShare, the following browser attributes should be set:

- Browser Caching: Turn off caching by setting your browser to "Check Every Time."
- Proxy Servers: Disable use of proxy servers for accessing your DocuShare server.
- Helper Applications: You will need to configure your Web browser's Helper (or Viewer) settings to use the appropriate applications to read files stored on your DocuShare server. Most browsers help you make these settings each time you encounter an unrecognized file type. To pre-configure your browser, see the "Getting Started" chapter of the User's Guide.

### Terminology

The information you store on a DocuShare server is described here as "*objects*." DocuShare objects include File, Collection, Saved Query, URL, Bulletin Board, Bulletin, Subscription, Calendar, Event, User and Group. Three of these objects - Collection, Bulletin Board, and Calendar - may contain other objects and are called *container objects*.

### Becoming a user

The DocuShare Site Administrator has the option of altering the DocuShare server's policies for site access, account creation, and general registry information. Under DocuShare's default access policy, anyone can view public areas of the server as user "guest." To set up your own user account, click on "Accounts" on the home page or the navigation bar at the top of all other pages. Registered users can add and edit objects and access more areas of the server, according to their access settings. After creating your account, you will not have access to restricted information in DocuShare until you contact the owner(s) of the information and ask them to give you access.

## Navigating the Site

A typical DocuShare site is navigated using normal web hypertext operations. The content is presented in the familiar model of nested directories or folders called *collections*. An important difference is that DocuShare objects may exist in more than one collection at the same time, thus leveraging the web's powerful hypertext capabilities.

The image displays four screenshots of the DocuShare web interface, illustrating the navigation flow between different pages. Red arrows indicate the sequence of clicks:

- Top Left Screenshot (Collection Services):** Shows the 'Web Jazz Development' collection. The 'Edit...' button in the top menu is highlighted with a red arrow pointing to the 'Collection Services' page.
- Top Right Screenshot (Collection Services):** Shows the 'Collection Services' page for 'Web Jazz Development'. The 'Edit...' button in the top menu is highlighted with a red arrow pointing to the 'File Services' page.
- Bottom Left Screenshot (File Services):** Shows the 'File Services' page for 'UI Design Spec'. The 'Edit...' button in the top menu is highlighted with a red arrow pointing to the 'Edit File' page.
- Bottom Right Screenshot (Edit File):** Shows the 'Edit File' page for 'UI Design Spec'. The 'Edit...' button in the top menu is highlighted with a red arrow pointing to the 'Edit File' page.

The interface includes a navigation bar at the top with links: [DocuShare](#), [Guest](#), [Login](#), [Accounts](#), [Contents](#), [Search](#), [New](#), and [Help](#). The 'Collection Services' page displays metadata for the 'Web Jazz Development' collection, including its title, summary, description, keywords, handle, owner, creation and modification dates, and modified by user. The 'File Services' page displays metadata for the 'UI Design Spec' file, including its title, summary, description, keywords, handle, owner, creation and modification dates, modified by user, document name, and content type. The 'Edit File' page provides a form to edit the file's metadata, including title, summary, description, keywords, content type, author, and maximum versions.

A typical Collection page is shown above. At the top is a navigation bar for general DocuShare utilities such as Search and Help, followed by the Collection's title, summary and brief description. The Edit pull-down menu lists operations that can be performed on the collection, such as delete, edit properties, edit permissions, and add content. Below the pull-down menu is the collection's content, which may include other collections, files, URLs, calendars, or bulletin boards. Other operations are available as you follow links to other relevant pages. For example, all objects' editing functions, such as Edit Properties, Edit Permission and Edit Location can be found on the object's Services page.

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## Permissions

Every DocuShare object has an owner and an access list of users and groups. Each user or group on the access list has one or more permissions to the object:

**Reader** The user or group can read the object and see its properties but cannot edit the object in any way.

**Writer** The user can edit the object content and properties, edit its location, lock/unlock a file and add new file versions. Writer access does not automatically give Reader access.

**Manager** The user is given Reader and Writer permission, and can delete the object and edit its permissions.

An object's permissions are accessible through the Permissions option in the object's Edit menu on its Services page. Adding a user or group to an object's access list is accomplished from the Edit Permissions page. This is available only with Manager access.

A new object inherits its permission settings from its container when it is added. If the permissions of the container object change, the new permissions do not propagate to objects it contains. The **Unify** command on the container object's Permissions page provides a means to propagate a container's current permission settings to all of the objects it contains.

User groups provide a convenient way to manage permissions on objects. A group can contain users and other groups. Assigning permissions to a related set of objects to a group allows you to edit only the group, and not all the objects, when needs change. The definition and management of groups is available in the DocuShare Community Registry.

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## How to...

### Add new information (collection, file, calendar, etc.)

New content is added to an existing Collection, Calendar or Bulletin Board by selecting the desired type of object from the Add menu in its pull-down menu. For example, the following object types are available for addition to a collection:

<b>Collection</b>	A general container object.
<b>Saved Query</b>	Allows users to store the query used in a search and reuse it again at a later time.
<b>File</b>	A user document, including both the original file and information about that file such as title, summary, author and keywords.
<b>URL</b>	A web pointer (URL) to relevant information, typically to an area outside of the current DocuShare server.
<b>Bulletin Board</b>	A container for simple bulletins to yourself or other users.
<b>Calendar</b>	A general calendar of events.

For each object type being added, you will be presented with a form that asks for information about it, such as its title, summary, and keywords. After filling out the form and clicking the Apply button, the object will be created, given a unique identifier (e.g., Collection-37) and made to appear in its initial parent object, which is the object being viewed when the **Add** command was selected. The new object's initial permission settings will be equal to those of its parent. In addition, the parent's owner will be given manager-level access to the new object. You, the user who created the new object, will be its initial owner and thus have manager-level access.

### Add new files (browser)

The **Add File** command on every collection's pull-down menu initiates the process for web browser users. You can use a browser to add (upload) files in one of two ways: 1) using an upload-capable browser, such as Netscape Navigator 2.0 or greater, or 2) using a separate UpHelper application available for free from your DocuShare site. The method of file upload used at any given time is controlled by two factors. First, DocuShare will attempt to determine if you have a file-upload-enabled browser and prevent you from attempting upload via an incapable browser. Second, your User record contains an attribute called **Use Helper for Upload**, which may be set to one of three values:

- **Never:** Never use UpHelper.
- **When Necessary:** Use the browser when possible, and otherwise use UpHelper.
- **Always:** Always use UpHelper, never the browser. This setting is required if you use an upload-enabled browser but still wish to use UpHelper because of its multi-file (bulk) upload features.

To use the DocuShare UpHelper application, you must:

1. Install the application on your local computer. It is available at [http://docushare\\_server/en-us/UpHelper/UpHelper.htm](http://docushare_server/en-us/UpHelper/UpHelper.htm)
2. Configure your browser. For Internet Explorer and Netscape Navigator, the UpHelper installer configures it for you. Otherwise, consult the User's Guide.
3. Edit your User record's **Use Helper for Upload** attribute to the desired setting.

### Add new files (Windows)

Windows users may add new or revised files in several ways. One approach is to use the **Add Document** button in the Windows Explorer button bar. This allows you to select an existing file, enter information about that file, and then upload it to the DocuShare server. Another approach is to select Save As after completing a new document from within the relevant authoring application (e.g., Microsoft Word) and save the file directly to DocuShare. Finally, you may use the standard Windows Explorer drag-and-drop operations to move or copy files from your local drive to DocuShare.

### Edit existing information

All commands to edit an existing object, including Edit Properties, Edit Location and Edit Permissions, are available from the object's Services page. You can also subscribe to DocuShare content and events of interest from this menu, and DocuShare will automatically notify you via e-mail when changes occur.

When listed as members of a collection, all objects have a [Services](#) link in the far right column that will take you to the object's Services page. In addition, collections, calendars and bulletin boards have an Edit Properties option in their pull-down menus that will also take you to the Edit Properties page.

### Edit a file (create a new version)

Documents can be opened and edited within their native authoring environment, then saved back to DocuShare as a *new version* of the document.

To revise an existing file using a web browser:

1. Click on the file's CheckOut icon from a collection listing, or select the **Check Out** option from the Edit menu on the file's Services page. This will lock the file and open it in the appropriate editor. Locking the file indicates to other potential authors that you are working on the document and prevents them from uploading new versions.
2. Edit the document.
3. If the editor is an ODMA-compliant application (e.g., Microsoft Word), use the editor's Save As option to locate the file on the DocuShare server and save the updated file as a new version. Alternatively, save the updated file to a temporary location on your local disk and click **New Version** from the file's Services page on DocuShare.

To revise an existing file using the DocuShare Windows Client:

1. Select the file to be revised and choose **Check Out** with the right mouse button. This will lock the file and open it in the appropriate editor. Locking the file indicates to other potential authors that you are working on the document and prevents them from uploading new versions.
2. Edit the document.
3. When done, select the Close option from the editor's File menu. For most applications, you will be asked if you want to save the file as a new version on DocuShare. Click on Yes.

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## Command Quick Reference

DocuShare commands are presented as menu options in each page's pull-down menu. No one is allowed to add or edit information when not logged in, independent of individual object permission settings. These commands are also available by directly typing the appropriate URL. The command name in **bold** is how the command appears in DocuShare's menus.

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### **View Properties** ViewProps

*Function:* Display the object's Services page, where the object's properties, such as its title, summary and creation date are displayed, and a variety of editing services are accessible.

*Authorization:* Anyone with Read access to the object.

*Location:* When listed as members of a collection, all objects have a [Services](#) link in the far right column that will take you to the object's services page. In addition, collections, calendars and bulletin boards have a View Properties option in their Edit menu that will also take you to their services page.

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### **Edit Properties** EditProps

*Function:* Edit the object's properties, which include its title, summary, and description. Location and permission settings are not considered properties.

*Authorization:* Anyone with Write access to the object.

*Location:* The object's Services page.

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### **Add** Add / handle / class

*Function:* Add a new object of type *class* to the container object whose handle is *handle*.

*Authorization:* Anyone with Write access to the container object *handle*.

*Location:* Pull-down menu of any collection, calendar or bulletin board page.

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### **Create User** AddUser

*Function:* Create a new user account.

*Authorization:* Depends on Account Creation Authority parameter set by site administrator. Defaults to anyone.

*Location:* Accounts (Community Registry) page.

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### **Create Group** AddGroup

*Function:* Create a new permission group.

*Authorization:* Any logged in user.

*Location:* Accounts (Community Registry) page.

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### **Delete** Delete

*Function:* Delete the current object. When applied to a collection, you will be given the option to delete all of the collection's contents as well.

*Authorization:* Anyone with Manager access to the object.

*Location:* The object's Services page. For collections, calendars and bulletin boards, it is also available in the Edit menu of the object's main page.

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### **Edit Location** EditLocation

*Function:* Change the place(s) in which an object appears; this includes adding locations, removing locations, and moving the object from one location to another.

*Authorization:* Anyone with Write access to the object.

*Location:* The object's Services page.

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**View**  
View

*Function:* View a container object (Collection, Bulletin Board, Calendar) and its contents.

*Authorization:* Anyone with Read access to the object.

*Location:* An object's title, when appearing in a collection listing.

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**Get**  
Get

*Function:* Get a file. The file will be displayed in the browser when possible or will download to the user's machine. The specific action depends on the browser's Helpers settings.

*Authorization:* Anyone with Read access to the file.

*Location:* Object's title link, when appearing in a collection listing.

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**GetRepr**  
GetRepr / [html | thumb]

*Function:* Get an alternate file representation. The file will be converted to a format displayable in the browser. If the file is in a format not supported for conversion, GetRepr will give an error response. GetRepr/File-29/html will convert File-29 to HTML and its images to JPEG. GetRepr/File-29/thumb will display a scaled-down thumbnail image of File-29; only image-based file formats (e.g., gif, tiff, bmp, jpeg) are supported for thumbnail.

*Authorization:* Anyone with Read access to the file.

*Location:* Object's HTML view icon, when appearing in a collection listing.

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**Lock**  
Lock

*Function:* Lock a currently unlocked file. This prevents any other user from adding a new version of the file until you have unlocked it. The file will be unlocked automatically if you add a new version. Delete will still be allowed.

*Authorization:* Anyone with Write access to the file.

*Location:* The file's Services page.

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**Unlock**  
Unlock

*Function:* Unlock a currently locked file. This allows other users with Write access to add new file versions.

*Authorization:* Anyone with Write access to the file.

*Location:* The file's Services page.

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**Check Out**  
CheckOut

*Function:* Lock a currently unlocked file and then get the file, opening it in the appropriate application.

*Authorization:* Anyone with Write access to the file.

*Location:* The file's Services page.

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**New Version**  
NewVersion

*Function:* Check-in a new version of a file. The previous version is saved in and remains accessible from the file's version history.

*Authorization:* Anyone with Write access to the file.

*Location:* The file's Services page.

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**History**  
History

*Function:* View the version history of a file. Each entry represents a different version, with information about when the version was created, who created it, and comments associated with it. Any past version may be retrieved from the history listing.

*Authorization:* Anyone with Read access to the file.

*Location:* The file's Services page.

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**Permissions**  
Permissions

*Function:* View or Edit the object's permissions. Shows the list of users and groups and their authorization settings, as well as the object's Private attribute.

*Authorization:* Anyone with Manager access to the object will be presented with the

Edit page. Anyone else with Read access to the object will be presented with the View page.

*Location:* The object's Services page. For collections, calendars and bulletin boards, it is also available in the Edit menu of the object's main page.

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**Add to Access List**  
*EditACL*

*Function:* Add more users and groups to an object's permission access list. Once on that list, they can then be granted specific permissions.

*Authorization:* Anyone with Manager access to the object.

*Location:* The object's Permissions page.

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**Unify**  
*Unify*

*Function:* Unify the permissions of all objects within a collection, calendar or bulletin board. This assigns the current object's current permission settings to all objects contained within it.

*Authorization:* Anyone with Manager access to the current object. Unify will only change objects within it for which you have Manager access.

*Location:* The object's Permissions page.

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**Change Owner**  
*ChangeOwner*

*Function:* Assign ownership of an object to another user.

*Authorization:* Anyone with Manager access to the object.

*Location:* The object's Permissions page.

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**Change Password**  
*ChangePassword*

*Function:* Change your account's password.

*Authorization:* Account owner.

*Location:* User Services page, which is found by clicking on your account name any place it appears, such as at the top of the page when logged in.

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**Change UserName**  
*ChangeUserName*

*Function:* Change your account's username, which is the name you use to log into DocuShare.

*Authorization:* Account owner.

*Location:* User Services page, which is found by clicking on your account name anywhere it appears, such as at the top of the page when logged in.

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**Month View**  
*CalendarMonth*

*Function:* Switch from viewing a calendar in a week-by-week format to a month-by-month format.

*Authorization:* Anyone with Read access to the Calendar. Does not alter the object or any other user's view of the object.

*Location:* Pull-down menu of any month-level view of the calendar.

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**Week View**  
*CalendarWeek*

*Function:* Switch from viewing a calendar in a month-by-month format to a day planner style week-by-week format.

*Authorization:* Anyone with Read access to the Calendar. Does not alter the object or any other user's view of the object.

*Location:* Pull-down menu of any month-level view of the calendar.

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**View Expired**  
*ViewExpired*

*Function:* View a bulletin board's expired bulletins. The option to delete a set of the expired bulletins is also offered.

*Authorization:* Anyone with Read access to the bulletin board. Deleting expired bulletins is only available to users with Write access to the bulletin board.

*Location:* Pull-down menu of any bulletin board.

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**MailTo**  
*MailTo*

*Function:* Send email to a Group. This uses your browser's email function, which must be properly configured to send email.

*Authorization:* Anyone

*Location:* The group's Properties page.

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***Index***

*Index*

*Function:* List the nested Table of Contents of a collection. Defaults to displaying only the first 5 levels. Optional "/n" argument allows specification of an alternate display depth. Only Collections are displayed.

*Authorization:* Anyone with Read access to the collection. Only readable content will be displayed.

*Location:* Navigation bar.

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***IndexAll***

*IndexAll*

*Function:* List the nested Table of Contents of a collection. Displays full depth and all object types contained within the collection.

*Authorization:* Anyone with Read access to the collection. Only readable content will be displayed.

*Location:* No where. Must be a typed-in URL (e.g., /IndexAll/Collection-45).

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***ListType***

*ListType*

*Function:* List all objects in the repository of a given type.

*Authorization:* Anyone. Only readable objects will be displayed.

*Location:* No where. Must be a typed-in URL (e.g., /ListType/Collection).

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